

National Learning Initiative

A national skills and learning framework for the voluntary sector

LEADERSHIP IN THE VOLUNTARY SECTOR: HUMAN RESOURCES TOOLS



*A collaborative project of the
Association of Canadian Community Colleges
and the Coalition of National Voluntary Organizations*

Canada

Voluntary Sector

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INTRODUCTION

The National Learning Initiative for the Voluntary Sector's Advisory Committee has three goals in publishing this handbook:

1. Assist the voluntary sector with the difficult challenges associated with the human resources management aspect of senior leadership within organizations, i.e. developing position descriptions, undertaking performance evaluations, etc.;
2. Assist individuals working in the voluntary sector with assessing their current skill level, particularly in the area of voluntary sector leadership; and
3. Bring our research to life for the voluntary sector by taking the results of our consultations with voluntary sector leaders and turning the competencies that emerged into useful, practical tools.

Each section is organized to outline the challenges faced by the organizations and individuals working in Canada's voluntary sector when approaching the specific task, with suggestions for how to proceed. Then samples or models are provided to assist with formulating a strategy useful to your organization now.

Every organization has different needs. For example, the needs of a new organization addressing issues facing aboriginal children and working at the national level will be different from the needs of an established organization addressing a specific local environmental concern. While there are similarities in the work of Executive Directors¹ everywhere in Canada, there are also differences. These differences can be found in the specific direction given to Executive Directors by their Boards or in the emphasis given to specific items in the skill set identified through the research process. Sometimes the differences come from

¹ The term "Executive Director" was chosen for use throughout this document, to mean the most senior staff person within an organization. Some other titles in use include: President, Chief Executive Officer, Director-General, etc.

the variety of models of Board governance that exist within the voluntary sector, with regard to Board involvement with operations. This is particularly true with smaller organizations that have fewer than five staff members.

Our purpose in offering this handbook is to assist your organization, no matter its size, or scope of operations, or specific issue area, with addressing its human resources management needs in terms of paid staff leadership:

- ***Position descriptions*** as part of the recruitment process;
- ***Performance assessments*** of Executive Directors; and
- ***Self-assessments*** for those individuals interested in pursuing a career path culminating in the position of Executive Director for a voluntary sector organization.

Position Descriptions

The section on position descriptions is designed to help you, the reader, think through what your organization needs from an Executive Director now and then determine whether or not the Board will expect a particular focus for the position of the Executive Director. The position description should also help to clarify the Executive Director's role in relation to the Board and the other staff. This has the added benefit of reminding the Board about the nature of their role with regard to the Executive Director.

Once these elements are in place, the position description can be developed to include the specific background, education, experience, skills, and abilities that your organization requires to identify a suitable Executive Director. Several model position descriptions are included, to show how position descriptions can vary, based on the type of focus (if any) for the Executive Director.

Performance Assessments

The section on performance assessments is designed to help you develop a policy and procedure for your organization to conduct Executive Director performance

assessments. A sample policy is included for your consideration as well as a sample form from the voluntary sector. Both of these documents should help to guide your thinking about what your organization needs.

A well-executed performance appraisal will enhance the relationship between the Board and the Executive Director, resulting in renewed energy from the Executive Director, and a greater understanding of the work of the organization by the board.

Self-Assessment

The section on self-assessment is designed to assist those individuals who are thinking about a career path in the voluntary sector, perhaps one which culminates in the position of Executive Director. The questionnaire is designed to assist individuals in assessing their skills and abilities in light of the competencies identified during the research process. In the process it is hoped individuals will identify their particular strengths as well as pointing out areas in which further training or development is required.

How were the competencies identified?

As part of its focus on leadership, the National Learning Initiative (NLI) for the Voluntary Sector undertook a practitioner-driven voluntary sector leadership competency identification process. To find voluntary sector leaders, we engaged in a national nominations process. In all, 136 nominators identified 399 voluntary sector leaders. Of these we selected 100 to receive invitations, ensuring a good cross-section of the sector in many ways:

- **Geographic** – leaders from almost every province and territory in Canada;
- **Sub-sectoral diversity;**
- **Small, medium, and large organizations;**
- **Scope of organization:** local, regional, provincial, national, international;

- **Special outreach** to organizations serving the following communities: people with disabilities, aboriginal peoples, visible minorities, immigrants, and francophones living outside of Quebec; and a mix of
- **Service delivery and advocacy organizations**

Sixty-four leaders participated in the two-day workshops, designed and facilitated by Ecosol Consulting. Workshops were held in Vancouver, Winnipeg, Ottawa, Montreal, and Halifax. Participating leaders identified the competencies they needed to be effective in their positions as Executive Directors or other senior staff positions. For the purposes of the research, competencies are defined as:

The knowledge, skills, abilities, intangible/tangible mindsets and behaviours (savoir, savoir-faire, et savoir-être) that lead to improving life in the community and the world through principled actions and professional behaviour in the voluntary sector. Core competencies are those competencies which are common across the voluntary sector, irrespective of regional or sub-sectoral differences.

The leadership competencies identified through this research and consultation process fit into five categories: values & beliefs; vision & alignment; strategies & resource management; relationships; and complexity.

Values and beliefs influence the behaviour of leaders and their choice of strategies; therefore, they underlie all of the other competencies. The values and beliefs identified in the research process affect the skills and approaches leaders bring to every component of their work. They also apply these values and beliefs to every level at which they work: self, organization, community and world. In effect the core beliefs and values constitute the "heart" of what a voluntary sector leader does.

The **Vision and Alignment** competencies enable leaders to achieve the noblest aspirations of the sector—peace, freedom, human rights, opportunity, culture, safety, justice, and removal of poverty and discrimination—while exercising leadership in community-based, inclusive and visionary work. Each of the competencies in this category has implications for the way leaders act, whether at the level of personal choices, organizational actions, leadership within the community, or leadership in a more global context.

The **Strategies and Resource Management** competencies relate to maximizing day-to-day operations through sound and ethical management practices. The competencies selected here were the most important of all those identified by voluntary sector leaders during the research process.

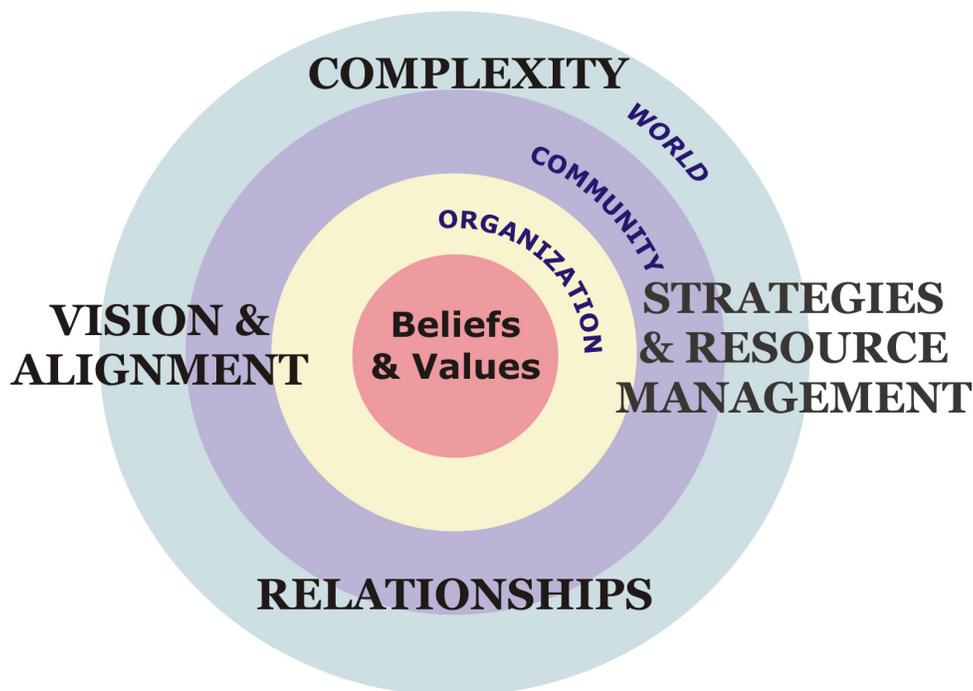
The voluntary sector is characterized as a sector that cares about people. Because leadership in the voluntary sector means working with people to get things done, the **Relationship** competencies identify the skills necessary to working effectively with people inside and outside the organization to achieve mission, and to enable the best of what is possible through human interaction.

The **Complexity** competencies relate to leading voluntary organizations in a complex, interdependent world where the organizational, political, social and institutional environment is undergoing unprecedented change and turbulence. These competencies are essential for understanding the larger context and systems within which leaders of organizations work, as well as functioning successfully within them.

For a complete list of the competencies identified through the research process, please see the diagram. Further information about the competencies themselves can be found in the NLI research report “What Do Voluntary Sector Leaders Do?” and in the National Learning Initiative’s discussion document, both found on the NVO website at:

http://www.nvo-onb.ca/projects_initiatives/nationallearning_e.shtml.

Competencies of Voluntary Sector Leaders



Vision & Alignment	Strategies & Resource Mgmt	Relationships	Complexity	Beliefs & values
<ul style="list-style-type: none"> • Public action • Public policy • Ethical & value-oriented decisions • External relations • Action on global issues • Culture of learning • Vision 	<ul style="list-style-type: none"> • Fund raising • Financial stewardship • Marketing & PR • Info & communication technologies • Research • Planning & evaluation 	<ul style="list-style-type: none"> • Interpersonal relationships • Communication • Political acumen/savvy • Public persona • Human resources • Team development • Collaboration 	<ul style="list-style-type: none"> • Healthy workplace environment. • Creative & innovative culture • Adaptation to change • Multiple accountabilities (including governance) • Interdependent perspective • Awareness of context • Cooperation & competition 	<ul style="list-style-type: none"> • Social responsibility • Sustainability & self-sufficiency • Building capacity • Individual ethical & principled behaviour • Inclusion & diversity • Passion & compassion • Courage

(Credit: Chloe O'Loughlin, WCWH Ltd.)

What is the National Learning Initiative?

The vision of the National Learning Initiative (NLI) is to foster dynamic leadership in the voluntary sector—effective, responsive, and accountable—for a vibrant democracy and caring, inclusive communities and by enhancing human resource development, through accessible, relevant education and training opportunities.

The NLI is a partnership of the Coalition of National Voluntary Organizations and the Association of Canadian Community Colleges, with an Advisory Committee made up of 35 representatives of the Canadian voluntary sector and educational institutions. See the Appendices for a full list of members.

The initial focus of the NLI is on voluntary sector leadership. Accomplishments to date include:

- An ***in-depth inventory*** of currently available leadership training programs;
- ***Research identifying the common core competencies*** for voluntary sector (staff) leadership;
- ***Validation of the competencies*** through a process of sector engagement;
- ***Publication of a discussion document*** providing examples of the competencies in action, and background information about the challenges in implementing the competency; and
- Establishment, through the Advisory Committee, of ***a national mechanism for ongoing consultation and collaboration*** between the voluntary and educational sectors.

How to Use this Handbook

This handbook has been designed to build on the leadership competencies, showing what these competencies mean for the day-to-day business of the voluntary sector. We share these tools with you in an attempt to strengthen the

capacity of the voluntary sector with regard to its paid staff leadership:

- If you are a **voluntary sector leader** (or aspire to be one), it is our hope that the discussion and examples contained here will stimulate your reflective practice.
- If you are a **member of a Board of Directors**, it is our hope that the discussion and examples will assist you to carry out your human resources management functions more effectively.
- If you are a **voluntary sector organization offering training** to your membership, it is our hope that the material here will be of use as you develop new human resources or leadership programs or materials.
- If you are an **educational institution**, it is our hope that you will incorporate this material into your voluntary sector programming.

Please feel free to use the material presented here, copy it and distribute it as broadly as you like, with appropriate acknowledgement and citation. Beverly Suderman developed materials in this handbook under the auspices of the National Learning Initiative for the Voluntary Sector, a joint initiative of The Coalition of National Voluntary Organizations, and the Association of Canadian Community Colleges. The copyright to these materials is held by The Coalition of National Voluntary Organizations, and the materials are copyright 2003.

Please think hard about the needs of your individual organization, or your career path, and adapt the materials presented here to be of most use to you or your organization, for your unique context. The only reason not to copy this material directly is because it will not be as useful to you that way; it will be most useful if you work with it to adapt it to your needs.

If you have any questions, or comments, please write. We would love to know how our materials are being used. Direct all comments to:

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We are also grateful for the support and assistance of our 35 Advisory Committee

members, who have donated hours of their time in assisting with the formulation of the research process, reviewing and critiquing the documents, and representing the NLI in their own communities and networks. Michael Anderson, of the Canadian Society of Association Executives, went above and beyond the call of duty in researching and providing the author with hard-to-find materials relevant to the Canadian not-for-profit context.

The EcoSol consulting team, ably lead by Diana Smith, with assistance from Chloe O’Loughlin, Lee Anne Johnstone, and Pierre LaCroix, completed the original research work.

None of this would have been possible without the assistance of the 64 voluntary sector leaders themselves who came together to share with us their wisdom and experience. The project’s accomplishments could not have occurred without this gift from voluntary sector leaders.

Lastly, we are also grateful to you, the reader, for participating in this enterprise. We welcome your thoughts and feedback on this document, or on the NLI in general. Please send your comments to bsuderman@nvo-onb.ca.

POSITION DESCRIPTIONS FOR EXECUTIVE DIRECTORS

Whether an organization is in the process of hiring a new Executive Director, or an Executive Director is already working for an organization, it is vital that there be a position description. A position description fills three human resources management functions within an organization:

1. **Recruitment;**
2. **Clarity of job purpose**, including role definition relative to other key constituents within the organization, i.e. the Board, members, etc.; and
3. **Partial basis for performance evaluation.**

While much has been written about developing position descriptions, very few resources are available for the most senior staff positions within an organization. This is because of the unique nature of the service an Executive Director² provides to the organization.

This chapter will outline the key elements of position descriptions, and discuss some of the challenges that need to be addressed in developing a position description. Several examples of position descriptions developed in response to specific organizational challenges are included.

What are the key elements of a position description?

The key elements of any position description include the following:

- **POSITION TITLE**
- **REPORTING RELATIONSHIP**

² For the purposes of this document, the term Executive Director has been selected to indicate the most senior staff position within an organization. Other titles that indicate similar responsibilities are also used within the voluntary sector, i.e. President, Chief Executive Officer, etc.

- **SALARY RANGE**
- **SUMMARY OF KEY RESPONSIBILITIES AND/OR FUNCTIONS; AND**
- **REQUIREMENTS/PREFERENCES/NEEDED SKILLS:**
 - **KNOWLEDGE**
 - **EXPERIENCE**
 - **QUALITIES**
 - **APPROACHES**
 - **EDUCATIONAL QUALIFICATIONS.**

In many cases, a position description is meant to be generic, so that it does not need to be updated too frequently. It can be supplemented by an annual work plan, which actually forms the basis for annual performance evaluations.

In the case of a position description for an Executive Director, the section entitled “Areas of Responsibility” must include any specific areas of concern for which the Executive Director is being (or has been) hired. The section outlining requirements and preferences for which the candidates will be screened must support the organization’s requirements of their Executive Director and also include a summary of key responsibilities or functions of the position. The key responsibilities or functions must, in turn, be related to the expected outputs or success factors for the position.

To prepare for developing a position description, therefore, an organization must be able to answer four questions:

- *What is our mandate as an organization, and as a Board, and based on this information, what should we be asking of our Executive Director as our key staff person?*
- *What are our organization’s core values that must be shared and embraced by our Executive Director?*
- *What challenges are facing the organization?*

- *What kind of a leader or manager does the organization need right now?*

These questions can pose a challenge for voluntary sector organizations.

Who is responsible for preparing the Executive Director position description?

In all cases, the Board, or a sub-committee of the board, has primary responsibility for preparing the position description for the Executive Director. The Board of Director's role in providing organizational oversight gives the Board insights into the organization's needs, enabling the Board to respond to those needs as pro-actively as possible. However, if an incumbent has begun a position without a position description, it is highly desirable for the incumbent and the Board to develop the position description together.

Challenges

There are a number of challenges to be addressed in preparing a position description for an Executive Director. These include:

- Identifying success factors; and
- Addressing the kind of personal qualities, attributes, skills, education, and experience that are required and desirable for the candidate who will fill the position of Executive Director.

In addition, it is important to recognize that the needs of sophisticated and highly professional organizations can be very different from small, local, community-based organizations. While skill sets for all Executive Directors may be similar, different organizations require different levels of ability within the skill set, or they may place different emphasis on certain skills.

Expected Outputs and Success Factors

One of the challenges in developing Executive Director position descriptions is

the dual nature of the job. Executive Directors are evaluated both on their ability to assist with the accomplishment of the organization's mission and on their ability to carry out a series of tasks related to organizational functioning. Because success factors are unique to each position, there are few models available that can assist organizations in developing position description, especially ones tailored to expected outputs and identified success factors.³ Yet it is the expected outputs and the success factors that indicate which type of person is required for the job.

In identifying outputs and success factors, Boards should be as concrete and specific as possible. Any statement of specific focus should be "SMART": Sensible, Measurable, Achievable, Results-oriented, and Time-bound.

For example, instead of stating that the candidate needs to raise the profile of the organization and raise more money, make a more specific statement, such as: "The executive director will plan a \$1.5 million capital campaign for a new unit, the planning process of which needs to be completed by the end of March, with initial pledges completed by the following February."⁴

The benefits of being specific are that the expectations will be made very clear for prospective candidates, and the search committee will have an easier time identifying the most suitable employee. This, in turn, provides a strong foundation for performance assessment.

Some may worry that being so specific may impede the creativity of the prospective Executive Director. However, according to research⁵, most Executive

³ McClintock, Norah (1998) "Hiring a Nonprofit CEO."

⁴ Janet Wright, of Janet Wright Associates, as quoted in McClintock (1998), p. 2 of 4.

⁵ Longenecker & Gioia, p. 115.

Directors appreciate a framework within which to work, one that can later be used as a basis for evaluation and/or further negotiation.⁶

Personal Qualities of Candidate

Most people tend to steer away from discussions about the personal qualities when searching for an executive director, since this tends to be a subjective area. Nevertheless, taking into account a candidate's personal qualities is vital because has the potential to affect an individual's ability to carry out the task. For instance:

- If the organization doing the hiring has had a very democratic, team-oriented corporate culture, the incoming Executive Director must be comfortable working in this way.
- If the position involves taking on the role of spokesperson for the organization, the candidate must feel comfortable in dealing with the media.
- If the position involves “growing” the organization, the candidate must feel comfortable with the level of attention to detail that such a task requires.
- If the position requires establishing partnerships with new groups, the candidate must feel comfortable in dealing with new people and organizations.
- If the organization's corporate culture is inclusive, the incoming candidate must be comfortable working in a diverse environment.

Many times the personal qualities that are required include passion (for the work), compassion (for the staff working on the issues, for the people affected by the issues), and courage, which is interdependent with, and can only occur when other qualities are also present, including honesty, humility, truth, wisdom, love, and respect.

⁶ This might be the case if, for example, after beginning the task, key elements are found to be missing, and the task is impossible as currently structured.

Therefore, in the preparation of a position description, and within the context of existing organizational challenges, the Board must answer a third set of questions:

- What kind of a leader or manager does the organization need right now? Does the board need “a risk taker, caretaker, or undertaker?”⁷
- What level of dynamism does the organization wish to project to the community?
- What types of issues will the Executive Director confront in the first six months? In the first year?
- What are the personal qualities the Board is looking for in this position?

Personal qualities include the beliefs and values of the candidates. These must be in alignment with those of the organization they wish to serve, both in terms of the perspective on the issue the organization is addressing (i.e. environment, birth control, health, etc.), and in terms of organizational values (i.e. transparency, accountability, social responsibility). The personal ethics and principles of an Executive Director, which are demonstrated through behaviours both on the job and outside of the workplace, have an impact on the leadership s/he will provide to the organization as a whole.

Required personal qualities should be specified in the position description, so that any recruitment process does not overlook them, and so that any future evaluation process includes a review of the requirements. Executives are often hired for their apparent technical skills and success, yet they are often fired because they lack certain shared qualities and values that transcend an organization. The ability to manage relationships and personalities is a key leadership skill. Personal investment of time and energy often drives the

⁷ Berenbeim, Ronald E. (1995) *Corporate Boards: CEO Selection, Evaluation and Succession – A Research Report*, page 17.

organization. It is important to appreciate the nature of the organization so to better align the required personal qualities with organizational mission and goals.

Sample position descriptions

NOTE: All of the following job descriptions need to be used as models only, and must be customized to meet the needs and nature of individual organizations, facing particular challenges.

EXAMPLE 1: DIVERSIFICATION OF FUNDING BASE

EXAMPLE 2: UNDERTAKING MAJOR ADVOCACY CAMPAIGN

EXAMPLE 3: BUILDING A STRONG ORGANIZATION

EXAMPLE 4: REACHING OUT INTO THE LARGER COMMUNITY.

The sample position descriptions contained in this section attempt to provide some models from which individual organizations can work, rather than to provide a blueprint that will work for anyone.

Not all of the detail in these position descriptions may be useful or representative of your organization. However, with a comprehensive set of choices to work with, you can select those details which best articulate the type of position description needed for your organization's Executive Director.

The content of these position descriptions is based on the Core Competencies for Leadership, developed through the National Learning Initiative for the Voluntary Sector project in 2002-2003.

EXAMPLE 1: DIVERSIFICATION OF FUNDING BASE

Immediate focus for Executive Director: Plan and implement a capital campaign for a new unit, the anticipated target of which will be \$1.5 million. The planning process should be completed by the end of March, and initial pledges are expected by the following February.

Challenges facing organization: Building a new unit to meet needs, while maintaining other organizational operations.

Job Title: Executive Director

Function:

- To give direction to and leadership for the achievement of the organization's philosophy, mission, strategy, strategic goals & objectives, and annual work plan.
- Plan and implement a capital campaign, to reach pledges of \$1.5 million, to build a new unit.
- With the Chairperson, enable the Board to fulfill its governance function.

Reports to: Board of Directors

Major Functions/Accountabilities:

1. Vision & Alignment

- Develop and maintain widespread support for the organization, with special emphasis on the capital campaign, through relationships with media, government(s), funders, donors,

members, clients, and other community organizations.

- Link the organization's vision to the strategic plans(s), marketing strategy, fundraising strategy, human resources strategy, and other components of the organization's work plan.
- Exercise leadership in the resolution of any ethical dilemmas which arise in the course of the organization's activities.
- Empower staff and volunteers to represent the organization fully in their relationships with other organizations, and people in the community.
- Nurture a culture of learning and social entrepreneurialism within the organization.
- Ensure that all marketing, public relations, reporting, and other external communications processes carry our organization's key message.

2. Fundraising

- Based on existing systems, and within existing policies, develop a fundraising plan for the new unit, with a target of \$1.5 million – without jeopardizing existing sources
- Implement the plan, with pledges beginning to arrive within 10 months of completion of plan
- Resolve any issues that arise related to ethics and accountability during the fundraising process

3. Board Administration and Support

- Synthesize, and report to the Board, about various global (i.e. larger than the organization) issues and/or initiatives that may have an impact on the operations of the organization
- Provide regular reporting to the Board about organizational operations, with complete, monthly financial statements
- Facilitate the work of the Board, and its committees

4. Resource Management

- Program, Product and Service Delivery

- i. Optimize information and communication technology solutions to meet the organization's program and service delivery needs
 - ii. Maintain on-going research program, and apply results to program and service delivery planning, as well as organizational strategic planning processes
 - iii. Monitor (and take action as appropriate) the delivery of services to the community, ensuring that services are available to all community members in culturally appropriate ways
 - iv. Manage multiple accountabilities, and assist staff and volunteers with their personal management of the multiple accountabilities required for their programming unit
- Financial, Tax, Risk and Facilities Management
 - i. Ensure adequate monitoring and control systems
 - ii. Manage financial accountability with many stakeholders
 - iii. Optimize inter-relationship between financial stewardship and organizational vision/mission, organizational planning, fund raising strategies, and human resources management.
 - iv. Keep current with developments in charities law and the insurance industry, as it may affect our organization
- Human Resource Management
 - i. Monitor (and take action as appropriate) to ensure that the workplace is inclusive, barrier-free, and welcoming to staff and volunteers, regardless of their ethnic or cultural background.
 - ii. Ensure that HR policies are current and in alignment with

governing law, particularly related to areas like harassment, recruitment, termination, conflict of interest, libel, etc.

iii. Create and sustain a healthy workplace environment

Requirements:

Knowledge & experience:

- Extensive experience in working with the media, and other public relations;
- Extensive and diverse fundraising knowledge and experience;
- Demonstrated abilities with human resources and financial management requirements;
- Policy development; and
- Collaboration/coalition building experience desirable, but not mandatory.

NOTE: This section should be longer, providing the quick screening device for evaluating applications for the position. However, the examples given here should provide a model for completing this section of a position description, in order to meet the needs of your specific organization and your specific requirements of the Executive Director.

Educational qualifications:

- A university degree in organizational management OR
- Equivalent education and experience.

Personal qualities:

- Excellent communicator, both oral and written, among peoples with diverse personal, social and cultural backgrounds.
- Political acumen.

- Ability to serve as organizational spokesperson.
- Ability to inspire and motivate staff and volunteers.
- Ability to enhance potential for creativity within the organization.
- Ability to work collaboratively with other community and voluntary sector organizations.
- Interdependent perspective.
- Awareness of the contextual environment within which our organization is functioning.
- Ability to both cooperate and compete, depending on the requirements of any particular situation.

Job description last revised and authorized by Board: [insert date here]

EXAMPLE 2: UNDERTAKING MAJOR ADVOCACY CAMPAIGN

Specific leadership challenge: Lead a major advocacy campaign to increase availability of affordable housing in Toronto by 2,000 units by the year 2006, by building a coalition of major organizations to develop and implement a plan of action.

Challenges facing organization: Organizational members increasingly reluctant to engage in advocacy activity due to CCRA rules; increasingly competitive funding environment.

Job Title: Executive Director

Function:

- To give direction and leadership toward the achievement of the organization's philosophy, mission, strategy, strategic goals and objectives, and annual work plan.
- Lead a major advocacy campaign to increase availability of affordable housing in Toronto by 2,000 units by the year 2006, through development and leadership of a coalition of partners to develop and implement the plan of action.
- With the Chairperson, enable the Board to fulfill its governance function.

Reports to: Board of Directors

Major Functions/Accountabilities:

1. Vision & Alignment

- Develop and maintain widespread support for the organization, with special emphasis on issues of affordable housing and poverty alleviation, through relationships with media, government(s), funders, donors, members, clients, and other community organizations.
- Link the organization's vision to the strategic plan, marketing strategy, fundraising strategy, human resources strategy, and other components of the organization's work plan.
- Exercise leadership in the resolution of any ethical dilemmas which arise in the course of the organization's activities
- Empower staff and volunteers to represent the organization fully in their relationships with other organizations and people in the community
- Nurture a culture of learning and social entrepreneurialism within the organization
- Ensure that all marketing, public relations, reporting, and other external communications processes carry our organization's key message

2. Advocacy & Coalition-Building

- Contact diverse groups that may have an interest in becoming part of the coalition; synthesize the policy of these groups to find a common ground
- Identify and analyze the political and decision-making structures regarding legislation, policy, budget, etc. in the federal, provincial, and municipal government systems – to find the areas where influence is possible and likely to be effective
- In consultation with coalition partners, develop and implement a strategic plan for the lobby effort, analyzing the alternative forms of action (law suits, social activism, etc.)
- In consultation with coalition partners, develop and implement a media strategy for the advocacy campaign

- Lead internal policy development process for our organization regarding the solution to the complex issue of providing affordable housing, based on our existing policy, and including the policy analysis prepared for the coalition. Present to the board in the form of a policy brief.
 - Serve as organizational spokesperson on this issue, and be willing to serve as coalition spokesperson, if that is what the media strategy calls for
 - Maintain balance between the needs of the campaign, and the needs of our organization.
3. Board Administration and Support
- Synthesize, and report to the Board, about various global (i.e. larger than the organization) issues and/or initiatives that may have an impact on the operations of the organization
 - Provide regular reporting to the Board about organizational operations, with complete, monthly financial statements
 - Facilitate the work of the Board, and its committees
4. Resource Management
- Program, Product and Service Delivery
 - a. Optimize information and communication technology solutions to meet the organization's program and service delivery needs
 - b. Maintain on-going research program, and apply results to program and service delivery planning, as well as organizational strategic planning processes
 - c. Monitor (and take action as appropriate) the delivery of services to the community, ensuring that services are available to all community members in culturally-appropriate ways
 - d. Manage multiple accountabilities, and assist staff and volunteers with their personal management of the

multiple accountabilities required for their programming unit

- Financial, Tax, Risk and Facilities Management
 - a. Ensure adequate monitoring and control systems
 - b. Manage financial accountability with many stakeholders
 - c. Optimize inter-relationship between financial stewardship and organizational vision/mission, organizational planning, fund raising strategies, and human resources management.
 - d. Keep current with developments in charities law and the insurance industry, as it may affect our organization
- Human Resource Management
 - a. Monitor (and take action as appropriate) to ensure that the workplace is inclusive, barrier-free, and welcoming to staff and volunteers, regardless of their socio-economic, ethnic or cultural background.
 - b. Ensure that HR policies are current and in alignment with governing law, particularly related to areas like harassment, recruitment, termination, conflict of interest, libel, etc.
 - c. Create and sustain a healthy workplace environment

Requirements:

Knowledge & experience:

- Extensive experience in effective political action and involvement in public policy processes
- Extensive experience in working with coalitions, and in collaboration with other organizations

- Extensive experience in working with the media, and other public relations
- Demonstrated abilities with human resources and financial management requirements, and fundraising

NOTE: This section should be longer, providing the quick screening device for evaluating applications for the position. However, the examples given here should provide a model for completing this section of a position description, to meet the needs of your specific organization and the your organization's specific requirements of the Executive Director.

Educational qualifications:

- Bachelor's degree in social sciences;
- OR
- Equivalent education and experience.

Personal qualities:

- Excellent communicator, both oral and written, among peoples with diverse personal, social and cultural backgrounds.
- Political acumen
- Ability to serve as organizational spokesperson
- Ability to inspire others with the vision of safe affordable housing for all
- Ability to enhance potential for creativity within the organization
- Ability to work collaboratively with other community and voluntary sector organizations
- Interdependent perspective
- Awareness of the contextual environment within which our organization is functioning
- Ability to both cooperate and compete, depending on the requirements of any particular situation

- Passion about the issue of affordable housing, and our organization's mission of improving the quality of life for those living below the poverty line.
- High ethical standards, and behaviour in accordance with the following principles: integrity, honesty, fairness, equity, trust, transparency, and accountability.

Job description last revised and authorized by Board: [insert date here]

EXAMPLE 3: BUILDING A STRONG ORGANIZATION

What the Board hopes the new Executive Director will be able to achieve:

Using a systems approach, develop policy and procedures to support a transparent, accountable, sustainable organization, resulting in an organization which exceeds workplace health and safety and accessibility standards, and creates an environment that attracts the best and brightest to work here.

Challenges facing organization: Outdated HR policies & procedures; outdated and inadequate financial policies & procedures; paper-based databases related to funders, donors, members, and volunteers.

Job Title: Executive Director

Function:

- To give direction and leadership toward the achievement of the organization’s philosophy, mission, strategy, strategic goals and objectives, and annual work plan.
- Develop policy and procedures for HR, financial & information management, to support a transparent, accountable, and sustainable organization.
- With the Chairperson, enable the Board to fulfill its governance function.

Reports to: Board of Directors

Major Functions/Accountabilities:

1. Vision & Alignment
 - Develop policy and procedures for HR, financial & information management, to support a transparent, accountable, and sustainable organization.

- Link the organization’s vision to the strategic plan, marketing strategy, fundraising strategy, human resources strategy, and other components of the organization’s work plan.
 - Exercise leadership in the resolution of any ethical dilemmas which arise in the course of the organization’s activities
 - Empower staff and volunteers to represent the organization fully in their relationships with other organizations, and people in the community
 - Nurture a culture of learning and social entrepreneurialism within the organization
 - Ensure that all marketing, public relations, reporting, and other external communications processes carry our organization’s key message
2. Board Administration and Support
- Synthesize, and report to the Board, about various global (i.e. larger than the organization) issues and/or initiatives that may have an impact on the operations of the organization
 - Provide regular reporting to the Board about organizational operations, with complete, monthly financial statements
 - Facilitate the work of the Board, and its committees
3. Resource Management
- Program, Product and Service Delivery
 - a. Optimize information and communication technology solutions to meet the organization’s program and service delivery needs
 - b. Monitor (and take action as appropriate) the delivery of services to the community, ensuring that services are available to all community members in culturally-appropriate ways
 - c. Manage multiple accountabilities, and assist staff and volunteers with their personal management of the multiple accountabilities required for their programming unit
 - Financial, Tax, Risk and Facilities Management

- a. Develop new financial and informational monitoring and control systems that maximize accountability and transparency
- b. Manage financial accountability with many stakeholders
- c. Optimize inter-relationship between financial stewardship and organizational vision/mission, organizational planning, fund raising strategies, and human resources management.
- d. Keep current with developments in charities law and the insurance industry, as it may affect our organization
- Human Resource Management
 - a. Develop top-notch, state-of-the-art HR policies that are in alignment with governing law, particularly related to areas like harassment, recruitment, termination, conflict of interest, libel, etc., and will attract the best and the brightest to work for our organization.
 - b. Develop and nurture a culture of learning within the workplace, for both staff and volunteers.
 - c. Monitor (and take action as appropriate) to ensure that the workplace is inclusive, barrier-free, and welcoming to staff and volunteers, regardless of their ethnic or cultural background.
 - d. Create and sustain a healthy workplace environment

Requirements:

Knowledge & experience:

- Extensive experience in human resources management; familiarity with recent developments in workplace health & safety legislation, and labour standards law.
- Extensive experience with financial management and information management systems.

- Knowledge of technological solutions to voluntary sector organization challenges in resources management
- Demonstrated abilities with fundraising, and public relations

NOTE: This section should be longer, providing the quick screening device for evaluating applications for the position. However, the examples given here should provide a model for completing this section of a position description, to meet the needs of your specific organization and your organization's specific requirements of the Executive Director.

Educational qualifications:

- Graduate or undergraduate degree related to the leadership or management of a voluntary sector organization;
- OR
- Equivalent education and experience.

Personal qualities:

- Ability to enhance potential for creativity within the organization
- Interdependent perspective
- Awareness of the contextual environment within which our organization is functioning
- High ethical standards, and behaviour in accordance with the following principles: integrity, honesty, fairness, equity, trust, transparency, and accountability.

Job description last revised and authorized by Board: [insert date here]

EXAMPLE 4: REACHING OUT INTO THE LARGER COMMUNITY

The specific directions to the Executive Director: Recognizing that the demographics of our organization's neighbourhood have changed dramatically in the past 10 years, and fearing that our organization has not been welcoming to all the neighbourhood's children, your task is to investigate all aspects of our operations that prevent children from coming here to use our services and prevent parents from volunteering here. After identifying barriers in the first six months, the executive director will present the Board with a plan of action to break down the barriers and make our organization a place where all our neighbourhood's children feel welcome.

Challenges facing organization: Shortage of volunteers; dropping enrollments in organizational programming; increasing costs/stagnant budget/dependence on single source of funding.

Job Title: Executive Director

Function:

- To give direction and leadership toward the achievement of the organization's philosophy, mission, strategy, strategic goals and objectives, and annual work plan.
- Develop policy and procedures to ensure that our organization is accessible and inviting to all our neighbourhood's children.
- With the Chairperson, enable the Board to fulfill its governance function.

Reports to: Board of Directors

Major Functions/Accountabilities:

1. Vision & Alignment

- Undertake research to identify barriers which currently exist to making our organization a welcoming environment
- Link the organization's vision to the strategic plan, marketing strategy, fundraising strategy, human resources strategy, and other components of the organization's work plan.
- Exercise leadership in the resolution of any ethical dilemmas which arise in the course of the organization's activities
- Empower staff and volunteers to represent the organization fully in their relationships with other organizations, and people in the community
- Nurture a culture of learning and inclusion within the organization

2. Board Administration and Support

- Synthesize, and report to the Board, the results of the barrier research, within 6 months of assuming this position; identify a plan of action for reducing the barriers, and implementing the organizational vision
- Provide regular reporting to the Board about organizational operations, with complete, monthly financial statements
- Facilitate the work of the Board, and its committees

3. Resource Management

- Program, Product and Service Delivery
 - a. Monitor (and take action as appropriate) the delivery of services to the community, ensuring that services are available to all community members in culturally-appropriate ways
 - b. Manage multiple accountabilities, and assist staff and volunteers with their personal management of the multiple accountabilities required for their programming unit
 - c. Evaluate existing program delivery from the perspective of potential barriers for participation.

- d. Through research with the community, identify modifications to be made to the programming to eliminate the barriers
- e. Develop enrollment strategies that highlight the new programming, and that welcome all neighbourhood children to come and play.
- Financial, Tax, Risk and Facilities Management
 - a. Manage financial accountability to funders
 - b. Develop and implement plan to diversify funding base
 - c. Optimize inter-relationship between financial stewardship and organizational vision/mission, organizational planning, fund raising strategies, and human resources management.
 - d. Keep current with developments in charities law and the insurance industry, as it may affect our organization
- Human Resource Management
 - a. Develop and nurture a culture of learning within the workplace, for both staff and volunteers.
 - b. Develop, implement, and monitor (and take action as appropriate) policies and procedures to ensure that the workplace is inclusive, barrier-free, and welcoming to staff and volunteers, regardless of their ethnic or cultural background.
 - c. Create and sustain a healthy workplace environment

Requirements:

Knowledge & experience:

- Knowledge of early childhood education, particularly in a multi-cultural and multi-lingual environment
- Organizational leadership experience
- Knowledge and demonstrated capacity to develop an inclusive organization
- Demonstrated abilities with fundraising, and public relations, and volunteer

recruitment/training

- Research ability and experience

NOTE: This section should be longer, providing the quick screening device for evaluating applications for the position. However, the examples given here should provide a model for completing this section of a position description, to meet the needs of your specific organization and your organization's specific requirements of the Executive Director.

Educational qualifications:

- Certification in early childhood education;
- OR
- A Bachelor's degree in sociology, anthropology, or related discipline;
- OR
- Equivalent education and experience.

Personal qualities:

- High ethical standards, and behaviour in accordance with the following principles: integrity, honesty, fairness, equity, trust, transparency, and accountability.
- Awareness of the contextual environment within which our organization is functioning
- Commitment to the creation of an inclusive organization.

Job description last revised and authorized by Board: [insert date here]

PERFORMANCE ASSESSMENT

Challenges

The literature shows that very few Executive Director's receive performance appraisals from their Boards. Many people would say that the Executive Director is the most important person in the organization, i.e. that the success or failure of the organization depends on the Executive Director's performance more than on any other member of the staff. This would seem to indicate a need to monitor and provide feedback to the Executive Director, yet often such evaluations fail to happen.

What are some of the challenges involved in designing and implementing a performance assessment process for an Executive Director? The challenges to be considered here include the following:

- Myths about performance assessments for Executives
- The need for criteria/objectives on which to base the performance assessment
- Separating organizational performance from individual performance
- The need for policy and procedures to govern the process
- The need to focus on strengths rather than weaknesses; and
- What to measure and how.

Towards the end of this chapter, you will find a sample policy and procedure, as well as some forms that have been developed by the Muttart Foundation for use in appraising the work of their Executive Directors, which might be able to be adapted for use by your organization.

Myths about Performance Assessments for Executives

Executives perform the most uncertain, unstructured, ill-defined, and often the most important work in organizations. Common wisdom would suggest that

people in such positions should be the ones supplied with the most effective feedback about their performance, simply because good, informative feedback helps them cope with the acknowledged demands of executive work.

Paradoxically, the opposite seems to be true. The higher one moves up in an organization the less likely one is to receive quality feedback about job performance.

Fallacious assumptions or myths about the nature of executives and their work often lead to the lack of performance appraisals or the poor quality of the ones conducted.⁸ What are these myths about executive performance appraisal?

According to Longenecker & Gioia, they are as follows:

1. Executives neither need nor want structured performance reviews;
2. A formal review is beneath the dignity of an executive;
3. Top-level executives are too busy to conduct appraisals;
4. A lack of feedback fosters autonomy and creativity in executives;
5. Results are the only basis for assessing executive performance; and
6. The comprehensive evaluation of executive performance simply cannot be captured via formal performance appraisal.⁹

The research shows, however, that contrary to these beliefs, executive both need and want structured performance reviews despite there being a certain amount of anxiety associated with the process. Furthermore, fostering autonomy and creativity in executives can be achieved in a variety of different ways, including providing feedback on a regular basis.

On what is the performance assessment based?

Criteria or objectives need to be established on which an Executive Director's performance assessment can be based. Of course, every organization wants to see

⁸ Longenecker & Gioia (1992) "The Executive Appraisal Paradox." P. 108.

⁹ Ibid, p. 112.

“results,” as indicated in Myth #5. Some people might argue that as long as the organization still has its doors open, with services being delivered, and no red ink on the financial statements, these delivered results are adequate to evaluate the work of the Executive Director. However, results also relate to accomplishment of mission, and are dual in nature.

Results can be measured both in terms of outcomes and in terms of the process used to achieve the results. Executive success depends on both, and performance appraisals need to look at both.

Longenecker & Gioia have this to say about Myth #6, “The comprehensive evaluation of executive performance simply cannot be captured via formal performance appraisal.”:

It is true that executive work is notably more ambiguous and uncertain than operational work, but it does not necessarily follow that standards for appraising that work cannot be developed. ... Flexible, but nonetheless specific, guidelines can be developed.¹⁰

They argue that doing effective executive appraisals is possible, as long as the process involves the top executive in process design, and the appraisal process is linked with performance planning.¹¹ Other tips for successful executive performance appraisal include the following:

- Include executives in the process by having them provide written self-appraisals which are taken into account in the evaluation;
- Use previously agreed-upon responsibilities, goals, and processes as the basis for the formal review;
- Focus the review on both specific, short-term goals, and on long-run issues;

¹⁰ Ibid, p. 112.

¹¹ The Conference Board, p. 22, is very clear on this matter. “CEO involvement in all aspects of the process (goal setting, evaluation, and reporting on final outcome to the full board) is essential for an assessment program to be a success.”

- Avoid nebulous language when giving feedback;
- If there is to be a link between performance and financial reward, make sure it is a strong link, by giving specific reasons for the financial reward; and
- Allow time for the airing of concerns, and engagement with personal and organizational development discussions.¹²

Clearly, there is little doubt that having a well-thought-out process in hand—one that has been agreed to in advance by the Executive Director—completed in accordance with policy and procedure, and performed in a sensitive manner will benefit the organization as a whole. It will facilitate a dialogue between the Board and the Executive Director about his/her leadership role.

Separating Organizational Performance from Individual Performance

Measurement and what to measure are important components of performance evaluation. According to Schneier, Beatty, and Shaw, “the real issue for measuring an individual CEO’s performance, as distinct from organizational performance, is to focus on what the CEO individually does or directs to be done or not to be done.”¹³ In other words, organizational performance can be an indicator of Executive Director performance. But the Executive Director should only be evaluated against those tasks over which s/he has some control. Ideally, those tasks would be formulated as objectives, and they would be contained in an Executive Director’s annual work plan.

A well-developed position description, complete with an annual work plan for the Executive Director, and an organizational strategic plan (if available), will provide a good foundation for determining the items on which an Executive Director should be evaluated.

¹² Ibid, p. 115.

¹³ Schneier, Beatty, and Shaw, p. 96.

Need for Policy & Procedure

Executive Director performance appraisal is an area where a clear policy and procedure need to be in place in advance. The appraisal process can be very formal, or fairly informal, but the process to be used must be written down, and policy questions must be addressed in advance.

What are some of the policy questions?

- How will different aspects of the evaluation be weighted? For example, will the financial results of the organization count for more than the human resources management? Will the external outreach count for more than the internal management?
- Who will be involved with the evaluation? Will it be the full board? Will it be a committee of the board? Will staff be involved? Will clients be involved?
- Will the results be confidential?
- Will the evaluation outcome be related to a salary or other compensation discussion?

The policy, with associated procedure, clearly outlines the roles and responsibilities related to the conduct of the Executive Director performance appraisal process. A sample policy might read as follows:

SAMPLE APPRAISAL POLICY

Annual Performance Appraisal of the Executive Director

- A performance appraisal of the executive director shall be conducted annually, and within three months of the fiscal year end, by an appraisal committee (or designated committee) of the board.
- Members of the board shall be invited to provide input to the appraisal committee.
- The appraisal committee shall consist of the past-chair, chair, and vice-chair.
- The appraisal committee shall determine the salary and/or benefit changes to occur, based on the results of the appraisal.

(The Muttart Foundation, p. 86)

A sample policy related to performance evaluation of the Executive Director, attempting to integrate all of the points mentioned, is included later in this document, for use in developing a policy appropriate for your organization.

Need to Focus on Strength

Peter Drucker, a management consultant with extensive expertise in the not-for-profit sector, argues that the greatest weakness of most performance appraisal systems is that they focus on weakness rather than on strengths. Furthermore, “For a superior to focus on weakness, as our appraisals require him [sic] to do, destroys the integrity of his [sic] relationship with his [sic] subordinates.”¹⁴

The alternative that Drucker proposes is to evaluate the performance of the individual against expectations in the current position, which has the advantage of focusing on strength, what the individual can do and has done, rather than focusing on weakness.¹⁵ In this system, “weaknesses are seen as limitations to the full use”¹⁶ of strengths and effectiveness.

Drucker considers character and integrity as crucial factors in hiring an executives and often asks himself this question when considering the character of an executive being considered for a position: “If I had a son or daughter, would I be willing to have him or her work under this person?” He explains that “by themselves, character and integrity do not accomplish anything. But their absence faults everything else. Here, therefore, is the one area where weakness is a disqualification by itself rather than a limitation on performance capacity and strength.”¹⁷

Given the power relations that are present within organizations, Drucker’s concern is one to be taken seriously.

¹⁴ Drucker (1967), *The Effective Executive*, p. 85.

¹⁵ *Ibid.*, p. 86.

¹⁶ *Ibid.*, p. 86.

¹⁷ *Ibid.*, p. 87.

What to Measure and How

So how does an organization decide what to measure in a performance evaluation and how to measure it?

The primary tools for determining the basis for the evaluation include the following:

- The Executive Director’s position description;
- The Executive Director’s annual work plan, containing goals; and
- Any additional instructions or direction the Executive Director may have received from the Board.

Secondary tools for determining the basis for the evaluation include the organizational strategic plan, the vision and mission statement of the organization, and related documents. While the Board is ultimately accountable for these elements of the organization, in a shared leadership model, the Executive Director can be assessed in light of these organizational-level goals according to the extent of his or her participation in carrying out the specified activities.

Other things to evaluate include intangibles that can result in behaviours destructive to the organization, such as Drucker’s argument for evaluating character and integrity. If one can assume that these desired intangibles were present in the person when hired, the assessment should relate to their maintenance rather than their absence.

Warren Bennis, a leadership guru, argues that “leadership is a creative enterprise”¹⁸ and that leaders create at least 6 things:

1. ***A compelling vision*** – pulling people into the vision, and motivating them to work on the task and goal;
2. ***A climate of trust*** – which again comes back to character. Bennis says that to create and sustain trust, a leader must have competence (capacity to do the job),

¹⁸ Bennis, p. 95.

congruity (integrity – a good match between what you feel and what you do), and constancy (or predictability in the relationship);

3. **Meaning** – by creating an environment where people are reminded of what is important;
4. **Success** – seeing mistakes as part of the feedback mechanism, rather than the end of the road;
5. **A healthy, empowering environment** – making people feel that they are at the heart of things, not on the periphery;
6. **Flat, flexible, adaptive, decentralized systems and organization, not bureaucracies.**¹⁹

Robertson & Naufal²⁰ identify a number of key questions to ask during the leadership recruitment process that can contribute to effective on-going evaluation strategies, ones that are based on strengths rather than weaknesses:

- Does the candidate have the ability to listen to others within the organization: volunteers, staff and Board?
- Does the person have an ability to share information effectively?
- What are the candidate's organizational and prioritization skills?
- Does the person possess effective communication skills?
- How does the candidate manage stress?
- Does the person possess good relationship skills in the work place?

If you hired the Executive Director on the assumption that these skills were present, on-going monitoring is acceptable.

To these components, Venture Philanthropy Partners²¹, using the McKinsey Capacity Assessment Grid's section on measuring the capacity of Executive Director's, would add the following skills/traits to the list above:

- Passion and vision

¹⁹ Ibid, pp. 95-99.

²⁰ Robertson & Naufal, p. [10].

²¹ Venture Philanthropy Partners, p. 97-100.

- Impact orientation
- People and organizational leadership/effectiveness
- Personal and interpersonal effectiveness
- Analytical and strategic thinking
- Financial judgment
- Experience and standing within the not-for-profit community.

An additional resource your Board and Executive Director might consider in determining the factors to be evaluated are the list of competencies identified by the National Learning Initiative for the Voluntary Sector, a joint initiative of the Coalition of National Voluntary Organizations and the Association of Canadian Community Colleges.²² See the full list of identified competencies in the “Self-Assessment” chapter of this document.

These are all suggestions that may help your organization formulate, in consultation with your Executive Director, an appropriate performance appraisal strategy. How the performance appraisal process is carried out depends very much on the policy and procedure that have been developed, but also on what has been or will be negotiated with the Executive Director.

²² Ecosol Consulting, *What do Voluntary Sector Leaders Do?* Available from http://www.nvo-onb.ca/projects_initiatives/nationallearning_e.shtml.

Sample Appraisal Policy

Annual Performance Appraisal of the Executive Director

- A performance appraisal of the executive director shall be conducted annually, and within three months of the fiscal year end, by an appraisal committee (or designated committee) of the board.
- Members of the board shall be invited to provide input to the appraisal committee.
- The Board will be fully informed and engaged throughout the process, in recognition that the Executive Director reports to the Board, not to any one individual or the Appraisal Committee.
- The appraisal committee shall consist of the past-chair, chair, and vice-chair.
- The appraisal committee shall recommend to the Board the salary and/or benefit changes to occur, based on the results of the appraisal.
- The specific components of the performance appraisal shall be negotiated with the executive director (i.e. weighting of the various factors, etc.), but will at a minimum, include the following:
 - A presentation by the executive director, based on accomplishments of the past year, in relation to the annual workplan, strategic plan, mission and goals of the organization
 - Development of the framework for the next year's workplan, if appropriate.
 - A review of the annual workplan, with a view to renegotiation.
 - A written performance appraisal report, signed off by the committee and the executive director, kept on file, and held confidential

Foster adds another important practical consideration to the process, saying: “It is important that the Executive Director have access to the Board or a spokesperson of the Board with whom s/he may bounce ideas, suggestions, and challenges. An annual appraisal can become quite daunting if there is no regular flow of information between

the Executive Director and the Board. The appraisal should be a confirmation of performance, or lack thereof, not an annual surprise package.”²³

²³ Tom Foster, Renaud Foster Management Consultants, personal communication with author, Sept. 22, 2003.

Sample Appraisal Procedure

The Muttart Foundation²⁴ recommends that the procedure start with an assessment of the working relationship between the Board and Executive Director. (See Appendix for a sample questionnaire to be completed separately by Board members and the Executive Director. The responses are analyzed and provide insights into the strength of the working relationship.)

After that, the steps identified by the Muttart Foundation are as follows:

1. **Review key documents**, particularly the strategic plan, to ensure they are up-to-date.
2. **Assess how current the Executive Director's position description is**, and whether or not it is up-to-date, and in line with the strategic plan. Revise position description if necessary to ensure key responsibilities section is current.
3. **Establish a performance appraisal committee of the Board**, and identify the authority of this committee, as well as its relationship to other Board members, i.e. what information gets shared; what information remains confidential, role of Board members who are not on the Appraisal Committee. At the same time, establish the role of the Executive Director in the process, as well as the role of other staff.
4. **Gather all documentation**, including:
 - Organizational strategic plan
 - Executive Director's position description, with annual work plan
 - Executive Director's regular and annual reports to the Board for the appraisal period
 - Examples of external feedback.
5. **Plan the performance appraisal process**, including:
 - Setting meeting dates and agendas

²⁴ The Muttart Foundation's *Board Development: Hiring and Performance Appraisal of the Executive Director* is the only Canadian not-for-profit sector source that was identified in the research for this project that comprehensively addresses the procedures involved in Executive Director Performance Appraisals. This section contains no original material, but is a summary of the material contained in their document. It is used with permission.

- Gathering data, internal and external, in consultation with the Executive Director
 - Setting the right atmosphere for the meeting
 - Creating safe and open communications processes, in part by asking yourselves the following questions:
 - i. Do you expect the executive director to be all things to all people?
 - ii. Can your executive director be frank when discussing the expectations of the job?
 - iii. Can your executive director feel safe in appraising his/her own performance?
 - iv. You might also wish to think about what are the questions that need to be asked during this process.
 - Planning for summary report to the Board
 - Planning for how to handle the unmet challenge.
6. **Carry out the performance appraisal process**, as planned in Step 5.
 7. **Conduct a committee self-evaluation**, including a documentation of what was done, what worked well, what could be improved, and any policy changes required.

Hold a Dress Rehearsal of the Appraisal

This suggestion is taken from (1996) *Evaluating the Nonprofit CEO – A guide for Chief Executives and Board Members* (Muttart Foundation).

A Canadian board chairperson says that the uncertainty that administrators often experience before an evaluation breeds tension that can lead to an unproductive meeting. That's why he came up with this idea.

Instead of a single performance review, he conducts a two-part evaluation that gives the executive director lots of room for input. "To avoid any conflict over the contents of the

final evaluation, I meet with the administrator to discuss a *rough draft* of his evaluation,” he says. “We do this on our regular evaluation form, only we write in pencil.

“This is the dress rehearsal for the real thing. It’s also the executive director’s opportunity to react and comment on my penciled-in assessment. I encourage him to tell me if there’s something I’ve overlooked or if there’s some language he objects to. If there is, we work together to resolve the disputed points.

“After this meeting, I make the changes to the form we agreed on. This approach tells the administrator that I listen to his concerns, and he’s satisfied that evaluations are fair.”

A well-executed performance appraisal will enhance the relationship between the Board and the Executive Director, resulting in renewed energy from the Executive Director, and a greater understanding of the work of the organization by the board.

Sample Appraisal Form

The following sample appraisal form is offered for your information as an aid to developing an Executive Director appraisal form that is suitable to your needs, from the Muttart Foundation's *Hiring and Performance Appraisal of the Executive Director: A Self-Guided Workbook*.

HIRING AND PERFORMANCE OF THE EXECUTIVE DIRECTOR <i>(Muttart Foundation)</i>
Personnel management
Financial management
Risk analysis
Advocacy management
Executive Director's Performance Appraisal Process

Muttart Foundation's Assessment of Board and Executive Director Working Relationship

THE PERFORMANCE APPRAISAL PROCESS

Yes No

1. Board and executive director can give examples of two-way communication.

Examples: _____

Yes No

2. Board and executive director can give examples of working together, with everyone participating actively in the process.

Examples: _____

Yes No

3. Board and executive director can give examples of a variety of decision-making techniques and procedures that fit specific situations.

Examples: _____

Yes No

4. Board and executive director can give examples of conflict and controversy being used as forces for positive change.

Examples: _____

Yes No

5. Board and executive director can give examples of establishing goals in a cooperative manner, taking into account both individuals' goals and the organization's goals.

Examples: _____

Yes No

6. Board and executive director can give examples of ways in which everyone is able to influence the decision-making process.

Examples: _____

SELF-ASSESSMENT

So you think that you want to be an Executive Director of a not-for-profit organization? Do you have the skills, knowledge and experience that would be required to be successful in such a position? How can you find out?

All the leadership development literature is crystal clear about the need for successful leaders to know themselves very well. Successful leaders know their strengths and their weaknesses, for which they have learned to compensate. Whether you are reading Warren Bennis, or Peter Drucker, or Stephen Covey, or other experts/theorists on the subject of leadership, they are unanimous on the subject of self-knowledge. That is the first challenge.

How can you begin to know yourself better?

Are you a leader, or a manager?

Several management/leadership gurus²⁵ have tried to articulate the differences between managers and leaders, often in very unflattering terms (at least for the managers among us). The reality, according to the voluntary sector leaders consulted during the NLI research, is that—given current demands—Canadian voluntary sector leaders need to have both sets of skills, and they need to operate effectively in those domains that are characterized as leadership, as well as in those domains that are characterized as management. The two skill sets (leadership and management) are very different, which presents a challenge to the aspiring Executive Director. How one responds to that challenge provides vital information about oneself.

Some effective leaders ensure that they have a team working with them, one which will compensate for their weaknesses. For example, if the leader's strength is vision and inspiring others to share that vision, but their weakness is implementation, they will have a "right hand" person to assist with the implementation component. If the leader's

²⁵ Check out Boyett and Boyett's *The Guru Guide* for a summary of what some of these differences can be. The theorists they summarize include: Warren Bennis, Burt Nanus, Robert Townsend, John P. Kotter, Manfred F. R. Kets de Vries, Warren Blank, Jon R. Katzenback, and others.

strength is community building and networking, s/he will have a “right hand” person to assist with keeping the home-based organization strong. In a very small organization, the leader may be a volunteer, in which case the organization must seek out a person as a staff member who can provide steady management for the day-to-day operations.

Some effective leaders take other steps to compensate for any weaknesses they perceive in their skill set. These leaders take courses, become members of professional associations like the Canadian Society of Association Executives, attend conferences, network with colleagues and so on.

In reality, the complexity of the environment within which voluntary sector leaders are functioning means that no one person has all the skills required to be effective in all situations. We need to work in teams. We need to be aware of our strengths and compensate for our weaknesses. We need to continue learning.

What are your ethics? Values?

Kouzes and Posner²⁶ argue that leaders are only able to lead because they are credible individuals. Credibility is a trait that must be earned, based on the qualities of “being honest, inspiring, and competent.”²⁷ Credibility is also “about consistency between words and deeds.”²⁸

The concept of leadership credibility includes a diverse array of personal values, and personal ethics. Kouzes and Posner argue that credibility is a built trait, built upon the “six disciplines of credibility. These are

1. Discovering your self
2. Appreciating constituents
3. Affirming shared values
4. Developing capacity
5. Serving a purpose

²⁶ Kouzes & Posner (1993) *Credibility* and (2002) *The Leadership Challenge*

²⁷ Ibid, *Credibility*, p. 21.

²⁸ Ibid, p. 47.

6. Sustaining hope.”²⁹

According to them, “someone who follows a discipline is a *learner*. Learning and practicing these six disciplines can help you build and maintain your leadership credibility.”³⁰

Seel³¹ takes issues of ethics away from the level of the individual, to the level of the organization, and places the individual’s actions within an organizational framework. “Ethics for organizations and individuals is very much about relationships and responsibility. As individuals and organizations, we owe certain duties of care and have certain obligations that mean that we need to educate ourselves on how to act.”³² He cites the model developed by the Association for Volunteer Administration and the Society of Management Accountants to help people resolve ethical dilemmas:

Step 1: Set out the core ethical values and principles that become the vocabulary for making an ethical decision. The following example comes from the Josephson Institute for Ethics:

Core Ethical Value	Supporting Ethical Principle
Trustworthiness	Truthfulness, sincerity, candor, integrity, promise keeping, loyalty
Respect	Respect, autonomy, courtesy, self-determination
Responsibility	Responsibility, diligence, continuous improvement, self-restraint
Justice and Fairness	Justice, fairness, impartiality, equity
Caring	Caring, kindness, compassion
Citizenship	Citizenship, philanthropy, voting

²⁹ Ibid, p. 51.

³⁰ Ibid, p. 52.

³¹ Seel (2000) “Ethics for Nonprofit Managers”

³² Ibid., p. 4.

Step 2: Proceed through a four-step ethical decision making process:

- Identify the key stakeholders in the situation by first considering the mission of the organization and then considering others
- For each stakeholder, identify which core ethical value or, if you can be more specific, which supporting ethical principle is at stake.
- Considering each stakeholder and the core ethical value or principle you selected, identify what action you could take.
- For each action, weight the positive and negative consequences.

Creating a table to track your progress simplifies the process. When you have gone through all stakeholders, review your results. The goal is to make your decision in such a way that you maximize the number of positive consequences and minimize the number of negative consequences.³³

This model provides a framework from which you can build your own set of core ethical values, with supporting ethical principles.

Crittendon advocates creating a personal code of conduct, by which he means writing down the rules that govern your life. Some of his suggested rules sound like the things our mothers taught us. He argues that writing these rules keeps them in your conscious mind. His suggestions:

- If it's worth doing, it's worth doing right.
- Make communications an obsession.
- Don't take yourself too seriously.
- Don't say things about someone behind his back that you wouldn't say to his face.
- Maintain absolute integrity in all things at all times.
- Never do anything that you'll be ashamed of later.
- Praise in public, criticize in private.
- Treat your word as your bond and keep every promise you make.

³³ Seel, pp. 3-4.

- Always be on time!
- Accept responsibility for your actions.
- Don't spend time trying to save nickels and dimes, or that's what you'll end up with – just a lot of nickels and dimes.
- Accept the fact that success is not final and failure is not fatal.
- Don't be afraid of making a mistake, but avoid costly ones and never repeat the same mistakes.
- When you need professional advice, get it from professionals, not from your friends.³⁴

Treat this list as a starting point for your own thinking on the matter.

What is your emotional intelligence quotient?

The basics of emotional intelligence include³⁵:

- Knowing your feelings and using them to make life decisions you can live with.
- Being able to manage your emotional life without being hijacked by it—not being paralyzed by depression or worry, or swept away by anger.
- Persisting in the face of setbacks and channeling your impulses in order to pursue your goals.
- Empathy—reading other people's emotions without their having to tell you what they are feeling.
- Handling feelings in relationships with skill and harmony—being able to articulate the unspoken pulse of a group, for example.

Check out this website http://www.utne.com/interact/test_iq.html for a quick emotional intelligence quotient quiz.

³⁴ Crittendon, pp. 6-16.

³⁵ The material in this section comes entirely from http://www.utne.com/interact/test_iq.html.

Strategies and Resources to build self-knowledge

You can use checklists to show you the constellation of skills and abilities that make for an effective leader, according to various researchers:

- Check out the **Harvard Manage Mentor Plus website**, at http://www.harvardmanagementor.com/demo/plusdemo/menu_cat.htm. In the “Becoming a Manager” demo unit, tools section, you will find a series of potentially useful checklists, including an emotional intelligence self-assessment, and a checklist for new managers.
- The **Alberta Government’s website** <http://www.pao.gov.ab.ca/toolkit/assessing/index.html>. This site has a number of self-testing resources, focusing on various personality tests.
- Pedler, Burgoyne & Boydell, in their book **A Manager’s Guide to Self-Development** (1994), have identified 11 skill areas, and have incorporated a checklist for individuals to use for purposes of self-diagnosis.
- The **Canadian Society of Association Executives** has created a self-evaluation tool in response to the Association Executive Competency Standards developed by them in 2000. This tool is free to CSAE members, and available to non-members from the CSAE on-line bookstore (www.csae.com) for \$19.95.

The National Learning Initiative’s checklist, based on the research undertaken with voluntary sector leaders in the fall of 2002, can be found at the back of this chapter.

Skill-Building Strategies

Once you begin to know yourself (which is a life-long process), it is possible to build your skills in those areas where you would like to develop more strength. This can be done in the context of your current position, through volunteer work, through finding a mentor, through networking, and by engaging in a variety of formal and informal education processes.

Wright³⁶ offers a list of basic reasons for why a not-for-profit Executive Director should get out and join various organizations. Some of these reasons apply equally well to aspiring Executive Directors. Such memberships allow you to:

- Represent your organization by collaborating with others for reasons important to your organization's mission
- Gain valuable experience
- Develop a valuable network of contacts
- Keep up with the latest developments, i.e. professional development
- Pursue your personal interests/passions.

Having encouraged "joining" as a way to pursue personal and professional objectives, Wright also offers a number of cautions about what types and the numbers of organizations to join:

- Don't overextend yourself, and be prepared to put in your time on your commitments.
- Choose wisely in all cases. Some committees are a waste of time.
- Use caution when joining coalitions, because they "may breed strange bedfellows. ... Do not risk your personal reputation, or that of your NFPO³⁷, by joining the wrong group for the right reasons."³⁸

Mentoring another person, or finding a mentor to work with you to achieve certain specific professional development goals can be a very meaningful and valuable way to develop skill sets. Because the focus in effective mentoring relationships is on learning, both the mentor and the mentee are continuously challenged to reflect on beliefs, values, and actions. The benefit, therefore, accrues to both parties.

Both formal and informal mentoring relationships are available. Formal mentoring programs tend to be found within larger organizations, like the United Way of Canada or YMCA Canada. Informal mentoring relationships tend to be initiated by the

³⁶ Wright (1992) *Not-for-Profit CEO*, pp. 97-99.

³⁷ NFPO = Not for profit organization.

³⁸ *Ibid*, p. 109.

individual who wishes to be mentored. In either case, the objectives of the mentoring relationship need to be clear to both parties, usually through some level of negotiation. Establishing a timeframe within which the objectives will be accomplished has been essential to an effective relationship. To learn more, see Zachary's *The Mentor's Guide*.

Self-Assessment Checklist, based on the NLI Leadership Competencies³⁹

This checklist has been designed to assist the user in identifying those competencies with which s/he has strength, and those competencies with which s/he may wish to gain more experience or knowledge. We envision the user to be someone who aspires to the position of Executive Director, but this tool may also be useful to individuals who are already in the position.

All of the questions included here are of the type that can be answered either “I feel confident about this” or “I need more work here.” All questions should be responded to honestly, comprehensively addressing existing experience, knowledge, educational background, and other ways of knowing that you have skills in this area.

The list is rather long, and you may wish to take your time in responding to all the questions, reflecting on your answers. You may wish to tackle only one section at a time.

³⁹ Some of these questions come from Pedler, Burgoyne & Boydell’s self-assessment questionnaire, pp. 32-35. Others were adapted from the CSAE Self-Evaluation Tool, or generated from O’Loughlin’s *Discussion Document*.

Competency Area	Specific Competency	Self-Assessment questions which might help you understand your strengths and weaknesses within each area.	<input type="checkbox"/> Yes, I can do this	<input type="checkbox"/> I need to work on this	<input type="checkbox"/> I cannot do this at all
Critical abilities	<i>High level of self-understanding</i>	<ol style="list-style-type: none"> 1. To what extent are you consciously aware of your own goals, values, beliefs, feelings, and behaviour? 2. How often do you stop to consider your own behaviour, its causes and effects? 3. How confident are you in your decision-making abilities? 4. Do you cope well with feelings of stress, tension, anxiety, and fatigue? 5. How do you behave in situations of great ambiguity? 6. How is your mental agility? How good are you at coping with several problems or tasks at the same time? 7. How are your problem-solving, analytical, and decision making skills? 8. Do you take care of yourself, physically and emotionally? 9. Do you provide self-direction, and are you self-motivated? 			

	<i>Commitment to lifelong learning</i>	<p>1. Do you keep informed about developments related to your work, or the challenges facing your organization?</p> <p>2. Do you use a range of learning opportunities?</p> <p>3. Do you keep up, in terms of staying on top of basic information (organizational policies, procedures, plans), relevant professional knowledge, and changes in the context/environment at the local, provincial, national, and international levels?</p> <p>4. Do you speak more than one language? Do you travel to learn more about your world, and the people in it?</p>			
	<i>Individual Ethical & Principled Behaviour</i>	<p>1. Do you understand ethical responsibilities and dilemmas?</p> <p>2. Do you demonstrate, in your day-to-day behaviour, adherence to established or desirable ethical standards?</p> <p>3. Do you set the highest standards for yourself and others, and monitor practices and outcomes?</p>			
	<i>Social Responsibility</i>	<p>1. Are you aware of your values regarding social responsibility?</p> <p>2. Are you aware of the principles related to corporate and governmental social responsibility? Can you see how these apply to the organization you work for?</p> <p>3. Do you ever analyse to see what's missing from important discussions, i.e. types of knowledge, or specific groups?</p>			

	<i>Sustainability and Self-sufficiency</i>	<p>1. What is your definition of sustainability? Does it include principles related to financial, environmental, social, cultural, and ecological footprint sustainability?</p> <p>2. Do you implement sustainability principles personally and organizationally?</p> <p>3. Could you put the organization you are currently working with on a more sustainable financial footing?</p>			
	<i>Building Capacity</i>	<p>1. Do you know how to develop effective and efficient multi-level structural relationships within an organization? Can you identify requirements for support, and provide the required support?</p> <p>2. Do you understand how, and why, policies, board motions, and by-laws are developed and implemented?</p> <p>3. Could you develop a culture of learning within your organization?</p> <p>4. Do you understand how the principles of adult education relate to building capacity?</p>			
	<i>Inclusion & Diversity</i>	<p>1. Can you articulate your personal values related to inclusion and diversity?</p> <p>2. Could you change your organization, to make it more inclusive and better reflect the community within which it is situated?</p> <p>3. Do you have a range of techniques related to implementing social inclusion?</p> <p>4. Can you cope with a diversity of opinions? Can you respect contrary opinions, and the people who hold them? Can you live with/manage conflict?</p>			

	<i>Passion & Compassion</i>	<p>1. Is your passion guiding your work life?</p> <p>2. Can you say what it means to behave compassionately in a leadership position? When is it important to be dispassionate?</p> <p>3. Can you describe the relationship between knowledge and compassion? Share your experience?</p>			
	<i>Courage</i>	<p>1. Are you a courageous person? Can you say how having courage relates to your career path/goal?</p> <p>2. Can you name some courageous leaders who have inspired you? Can you help others to be courageous?</p>			
Vision & Alignment	<i>Vision</i>	<p>1. Do you understand the importance of organizational vision?</p> <p>2. Can you identify a vision with stakeholders, and guide individuals and groups towards promoting, sharing, and contributing to the vision?</p> <p>3. Can you anticipate future needs and potential developments for your organization? Or for your community?</p>			
	<i>Ethical/Value-oriented decisions</i>	<p>1. Can you make decisions in situations in which there is more than one right answer, and all the answers are complicated or difficult?</p> <p>2. Can you lead an organization through a formal process to make decisions or write policy about a complex, ethical issue?</p> <p>3. Do you have a range of decision-making techniques to help you lead an organization?</p>			

	<i>Public Action</i>	<p>1. Do you understand political and decision-making structures within your sphere of action (international, federal, provincial, regional, and municipal)?</p> <p>2. Do you have experience with advocacy, lobbying, social activism, and government relations, from the perspective of the voluntary sector?</p> <p>3. Do you have experience with community development, or coalition building, or other collaborative activities?</p> <p>4. Do you have experience with a variety of types of public action, e.g. law suits, social activism, etc.?</p> <p>5. Do you know how to plan, develop, and manage advocacy activities, while relating them to member interests? Are you aware of the law related to lobbying by charities?</p>			
	<i>Public Policy</i>	<p>1. Can you develop policy options, with supporting analysis?</p> <p>2. Do you have quantitative analysis skills, including statistical analysis?</p> <p>3. Do you have experience with writing policy briefs?</p> <p>4. Do you have experience with interest-based negotiations?</p>			
	<i>External Relations</i>	<p>1. Do you know how to collaborate effectively? Do you know how to compete effectively? Do you know when to use competitive and collaborative skills to best effect?</p> <p>2. Do you have experience with media? Funders (government and foundations)? Government (staff and politicians)? Donors? Members?</p> <p>3. Could you change the way your organization relates to the people it serves, to enhance the legitimacy of your organization? If you would not change anything, why not?</p>			

	<i>Global Issues</i>	<p>1. Do you know how to collaborate effectively? Do you know how to compete effectively? Do you know when to use competitive and collaborative skills to best effect?</p> <p>2. Do you have experience with media? Funders (government and foundations)? Government (staff and politicians)? Donors? Members?</p> <p>3. Could you change the way your organization relates to the people it serves, to enhance the legitimacy of your organization? If you would not change anything, why not?</p>			
	<i>Culture of Learning</i>	<p>1. Do you understand self-assessment, mentoring, and staff development techniques and practices?</p> <p>2. Do you maintain a career management plan and use a mentor?</p> <p>3. Do you continually demonstrate learning, and promote the value of learning for self and others?</p> <p>4. Are you familiar with the principles of adult education, and how they might affect the development of a culture of learning within your organization?</p>			

<p>Strategies & Resource Management</p>	<p><i>Management</i></p>	<ol style="list-style-type: none"> 1. Are you able to relate theory and practice in management? 2. Do you understand the distinction between governance and management? Do you have a variety of skills and techniques to enable your organization to govern and manage appropriately? 3. Can you develop policy options, with supporting analysis? 4. Do you understand the importance of developing and maintaining a strategic management process? 5. Do you have experience with developing and maintaining a strategic management process? 6. Do you know how to use standards, performance indicators and policy to support strategy implementation? 7. Do you understand insurance and tax issues for voluntary sector organizations? 8. Do you value and recognize the impact of innovation and creativity in making continuous improvements to organizational operations? 			
	<p><i>Fund raising</i></p>	<ol style="list-style-type: none"> 1. Do you have experience with planning, developing, and managing a variety of types of fundraising activities, campaigns and events? Do you know how to oversee these activities? 2. Do you have skills in planning and research for fundraising? 3. Can you articulate your personal ethics around fundraising? Do you know, understand, and implement professional standards for fundraising? 			

	<i>Financial Stewardship</i>	<ol style="list-style-type: none"> 1. Do you understand the role and importance of financial and management accounting within the organizational framework? 2. Can you read balance sheets, cash flow statements, and other financial documents? 3. Do you have skills or training with regard to establishing financial record-keeping systems? 4. Do you understand the legalities and statutory framework regarding finance, e.g. conflict of interest, investments, etc? 5. Can you understand the relationship between organizational vision and mission, and financial record-keeping and analysis, fund raising, and human resources? 6. Can you manage financial accountability with many stakeholders? 			
	<i>Marketing & Public Relations</i>	<ol style="list-style-type: none"> 1. Do you have experience in planning, developing, and managing marketing or public relations programs or campaigns? Can you evaluate the effectiveness of these programs? 2. Do you understand how marketing and PR relate to vision and mission, planning, fundraising, human resources, budgeting, political action, public education, and other necessary activities of a not-for-profit organization? 3. Do you have experience with market segmentation, target marketing, positioning strategy, market niche, and image, and related analytical and research tasks? 			

	<p><i>Information & Communications Technology</i></p>	<p>1. Do you have experience with the new types of information and communications technology, i.e. computers and software, e-mail, internet?</p> <p>2. Are you active in using the on-line technologies available to you, i.e. e-mail, search/browse, internet, on-line writing styles, etc.?</p> <p>3. Are you aware of the potential of developing information technologies for the accomplishment of mission, i.e. enhanced cell phones, video-streaming, 'smart mob' techniques, etc., as they are being used for fundraising, social action, collaboration?</p> <p>4. Can you state your position on the ethical issues relating to the use of information technology?</p>			
	<p><i>Research</i></p>	<p>1. Do you have previous experience with research? As a researcher? As a user of research? As a participant in the research process?</p> <p>2. Do you have an understanding of various research processes, i.e. quantitative, qualitative, participatory? Do you understand the strengths and limitations of each type of research, in terms of the ethics, data gathering, analysis, synthesis, use of statistics, evaluation principles, etc.?</p> <p>3. Do you have experience with the application of research findings to determine appropriate action(s), e.g. developing evidence-based policy positions?</p> <p>4. Can you communicate effectively about research, i.e. can you tell a story with the results of the research?</p>			

	<p><i>Planning & Evaluation</i></p>	<ol style="list-style-type: none"> 1. Do you have experience in using the strategic management process to involve key stakeholders in defining the mission and organizational plans, as appropriate? 2. Do you understand the relationship between planning and governance, finance, fundraising, human resources, volunteer program, etc.? 3. Can you articulate the critical components of the planning process? 4. Can you spot opportunities for improvement in an organizational planning process? 5. Can you compare and select the appropriate research tool, to get the information required, i.e. feasibility studies, surveys, operation reviews, etc.? 6. Do you know how to develop effective processes to ensure that adequate monitoring and evaluation occurs? 7. Do you understand the differences between traditional and complex adaptive systems models of planning? 8. Do you have experience with developing and implementing a community needs assessment, or community inventory? 9. Can you identify and defend the ethics for voluntary sector organizations in the relationship between evaluation, funding and accountability? 			
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<p>Relationships</p>	<p><i>Interpersonal Relationships</i></p>	<ol style="list-style-type: none"> 1. Are you sensitive to the way other people are feeling, or to the way in which they are likely to react? What steps do you take to develop this sensitivity? 2. How much do you know about what other people think and feel about you? Are you familiar with how your personality might affect your interpersonal relationships? 3. Are you able to improve poor working relationships? What skills and techniques do you use to resolve situations involving inter-personal conflict that might include anger, hostility, and/or suspicion? 4. Are you able to influence people? Negotiate effectively? Provide constructive critical feedback? 5. Are you familiar with law and policy related to interpersonal relationships: harassment, hiring, firing, conflict of interest, slander and libel, etc.? 6. Have you ever mentored anyone? Been mentored by anyone? 7. Do you have any experience with managing change? Conflict? Crisis? 8. Do you sometimes harbour prejudices about certain types of people? 			
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	<i>Communication</i>	<ol style="list-style-type: none"> 1. Do you have good interpersonal communications skills? 2. Can you anticipate, respond, and adapt your approaches and style to different situations and demands? 3. Do you have an understanding of the various types of communications available? 4. Are you logical, persuasive, and constructive in your communications? 5. Can you use communications technology effectively and efficiently? 6. Do you have experience with developing culturally appropriate communications, i.e. for fundraising, public education, etc.? 7. Do you encourage communications from individuals with a variety of abilities and styles, and with various personal, cultural, and social backgrounds? 8. Do you have experience with planning, developing and managing a communications and/or publications program? 			
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	<p><i>Political Acumen/Savvy</i></p>	<p>1. Do you consider yourself to be wise, courageous, knowledgeable and respected? Could you develop these qualities in yourself?</p> <p>2. Do you understand group dynamics? Systems thinking? Complexity science?</p> <p>3. Do you feel comfortable dealing with conflict, complexity, chaos, and controversy?</p> <p>4. Are you aware of the tensions between cooperative/collaborative strategies, and competitive/confrontational strategies? Do you have experience with determining when one type is more effective than the other?</p> <p>5. Do you have experience in evaluating personal and organizational risks when undertaking politically tricky situations, i.e. advocacy campaigns? How are your networking and collaboration skills?</p>			
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	<i>Public Persona</i>	<ol style="list-style-type: none"> 1. Do you have effective relationships with media personnel? 2. Are you able to represent and speak about your organization or issue publicly? 3. Do you have experience with developing public position statements for an organization? 4. Are you comfortable with public speaking, and being interviewed (print, TV, radio, and information technology)? 5. Do you have experience with developing a variety of personal styles, to be suitable for different audiences? 6. Have you trained others to become organizational spokespeople? 7. Can you articulate the ethics and legal issues related to representing your organization? 8. Do you know how to deal with a crisis that is public? 			
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	<p><i>Human Resources</i></p>	<p>1. Do you understand the role of volunteers? How to recruit? Whom to recruit? How to train, supervise, and recognize volunteers within your organization? Legal and ethical issues? Staff/volunteer relationships? Orientation and training processes?</p> <p>2. Do you have experience in working with various governance groups (boards of directors, or sub-committees) to complete and evaluate their work?</p> <p>3. Can you clearly define and differentiate the roles of staff members, volunteers, and directors in your organization?</p> <p>4. Have you had experience in the recruitment and retention of staff? Have you put into place strategies to develop staff to meet the needs of the organization?</p> <p>5. Do you have experience in implementing a human resources program, including policy development, hiring and firing, training and orientation, performance management, flexible work arrangements, diversity issues, employment policies and practices?</p> <p>6. Do you know about liability insurance?</p> <p>7. Do you have experience in working with unions? Do you have union-management negotiation skills?</p>			
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	<i>Team Development</i>	<ol style="list-style-type: none"> 1. Do you understand team building techniques and dynamics? 2. Do you appreciate the value of diversity on a team? 3. Do you have experience as a leader or member of a multi-function team? 4. Can you build and motivate teams inside your organization? 6. Have you ever developed a virtual team, made up of people in different locations, and facilitated them? 7. Have you had any experience with managing and resolving conflict? Criticism? Disagreement? 			
	<i>Healthy Workplace Environment</i>	<ol style="list-style-type: none"> 1. Can you define a healthy workplace? Does your definition include: interesting & challenging work, pleasant & stimulating work environment, ensuring work-life balance? 2. Can you articulate the role of human resources policies and practices in creating a healthy work environment? 3. Are you familiar with the requirements of occupational health regulations, policies and practices? 4. Do you have experience in managing flexible work arrangements? 5. Do you understand how an organization's attitude towards creativity and learning affect the work environment? 			

	<i>Collaboration</i>	<ol style="list-style-type: none"> 1. Do you work well on a team? 2. Can you build and motivate teams with representatives of other organizations? 3. Can you facilitate teams to work together on common goals, engendering commitment? 4. Can you facilitate consensus building and commitment towards the mission, and implementation of the mission? 5. Do you have experience in leading a collaboration of equals? Can you identify the key factors that contribute to the success or failure of a collaboration? 6. Have you developed a collaboration or partnership agreement between organizations? 			
Complexity	<i>Creative & Innovative Culture</i>	<ol style="list-style-type: none"> 1. How easy do you find it to come up with new ideas? How do you feel when all the well-tried solutions to a problem have failed? What do you do to try to see new ways of doing things? 2. Can you create an environment where innovation and creativity are encouraged in the organization? Can you lead by example? Do you have skills and techniques to facilitate new methods, approaches, and solutions to problems in an organization? 3. Can you ensure that innovative and creative products, services and/or practices are implemented? Do you know how creativity and innovation can be rewarded? 			

	<i>Adaptation to Change</i>	<ol style="list-style-type: none"> 1. Can you adapt to change? 2. Can you recognize different stages within change processes, and the importance of flexibility and ability to negotiate while going through change? 3. Can you tune into the external environment when going through change? 4. Do you have experience with using change management processes to the benefit of an organization? Involving key stakeholders? 5. Do you know your response to setbacks? Do you persevere? What helps you to persevere? 			
	<i>Multiple Accountabilities</i>	<ol style="list-style-type: none"> 1. Do you demonstrate commitment to members, volunteers, staff, donors, and other stakeholders of the association? 2. Can you evaluate current governance and decision-making efforts, and establish structures, operating processes and accountability mechanisms to ensure effectiveness? 3. Do you understand reporting to fulfill accountability requirements (to funders, donors, members, clients, beneficiaries, etc.)? 4. Have you undertaken member surveys, to determine needs/wants? 5. Do you have experience with member relations programs? 6. Can you deal with conflict related to differing and opposing accountabilities, e.g. differing priorities of funders and stakeholders? 			

	<i>Interdependent Perspective</i>	<p>1. Do you know when your assumptions about what's going on are correct? How do you know?</p> <p>2. Can you identify in which situations you tend to be independent and proactive, as compared with situations in which you tend to be dependent and reactive? Are there situations in which you respond differently from either of these extremes?</p> <p>3. Do you feel confident that you could take a stand that is entirely opposed to the majority? How would you know that you were acting appropriately?</p>			
	<i>Awareness of Context</i>	<p>1. Can you identify the cultural, social, economic, environmental, and technology trends and issues in your external environment? Potential future issues?</p> <p>2. Can you identify which of these issues are of importance to your clients, organization, or community?</p> <p>3. Are you comfortable with challenging current strategies, and exploring different ways of operating?</p> <p>4. Can you approach tasks and problems such that the total system and strategies are taken into account by self and others?</p>			
	<i>Cooperation & Competition</i>	<p>1. Can you lead cooperative/collaborative activities?</p> <p>2. Can you resolve conflicts or conundrums between personal and organizational values, priorities, etc.?</p> <p>3. Do you feel comfortable with competitive or confrontational techniques for social change, i.e. law suits, social activism?</p> <p>4. Do you have experience with interest-based negotiation?</p> <p>5. Can you identify how you decide when to cooperate or collaborate, and when to compete or contravene?</p>			

APPENDICES

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THE VSI CAPACITY JOINT TABLE

The National Learning Initiative for the Voluntary Sector project is one initiative funded by the Government of Canada through the Capacity Joint Table of the Voluntary Sector Initiative (VSI). The Capacity Joint Table, one of 7 joint tables created to undertake the work of the VSI, undertook projects in four key areas of capacity-building for voluntary organizations:

- ***Research and Information Sharing***
- ***Skills Development and Recruitment***
- ***Policy Capacity***
- ***Financial Capacity***

These projects have resulted in a multitude of resources that are available to non-profit and voluntary organizations, governments, educational institutions, volunteers and voluntary sector researchers. Many of the products will be released during 2003.

For more information about these projects, the joint tables and the VSI, please check the VSI website at www.vsi-isbc.ca.

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Resources from the Capacity Joint Table

The Capacity Joint Table (CJT) was one of seven Government of Canada–voluntary sector tables established under the Voluntary Sector Initiative (VSI). The VSI's long-term objective is to strengthen the voluntary sector's capacity to meet the challenges of the future, and to enhance the relationship between the sector and the federal government in order to better serve Canadians.

SKILLS DEVELOPMENT AND HUMAN RESOURCES MANAGEMENT

Developing Human Resources in the Voluntary Sector (HRVS) www.hrvs-rhsbc.ca

National Learning Initiative (NLI): A National Skills and Learning Framework for the Voluntary Sector and **Voluntary sector leadership competencies** www.nvo-onb.ca

RESEARCH AND INFORMATION SHARING

The Capacity to Serve: A Qualitative Study of the Challenges Facing Canada's Nonprofit and Voluntary Organizations www.nonprofitscan.ca

National Survey of Nonprofit and Voluntary Organizations (NSNVO)
www.nonprofitscan.ca (2004)

Johns Hopkins Comparative Nonprofit Sector Project www.nonprofitscan.ca (2004)

National Survey of Giving, Volunteering, and Participating (NSGVP)
www.givingandvolunteering.ca

POLICY CAPACITY

Policy Internships and Fellowships:

Bridging the Policy Dialogue Between Voluntary Organizations and the Federal Government
www.cvsrd.org and <http://publicadmin.uvic.ca/cpss>

Participating in Federal Public Policy: A Guide for the Voluntary Sector www.vsi-isbc.ca

FINANCIAL CAPACITY

Funding Matters: The Impact of Canada's New Funding Regime on Nonprofit and Voluntary Organizations www.ccsd.ca

Resources for Accountability and Financial Management in the Voluntary Sector
www.vsi-isbc.ca

Inventory of Effective Practices in Financing and Resourcing of Voluntary Sector Organizations in Canada www.vsi-isbc.ca

These projects are funded by the Government of Canada through the Voluntary Sector Initiative.

For more information, visit www.vsi-isbc.ca
or fax the Capacity Joint Table Secretariat at 819-997-2056.

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